



Colorado.gov

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## Customer Administrator Account Management

# User Manual

*Version 1.0*

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## Overview

### 1.1 WELCOME

Welcome Customer Administrator. This manual will show you how to manage your account with Colorado Interactive including changing account information, billing information and managing your users. This information is also available on our Registered Services site. All account management is done through our Customer Database. (CDB)

Access Registered Services Page:

<http://www.colorado.gov/registration/>

Log into Customer Data Base (CDB):

<https://cmbs-admin.soltn.cdc.nicusa.com/co/cust-admin/login.html>

### 1.2 CUSTOMER SUPPORT

#### Phone

303-534-3468

Toll free: 800-970-3468

(Available Monday – Friday, 8:00 am – 5:00 pm)

#### Email

[support@www.colorado.gov](mailto:support@www.colorado.gov)

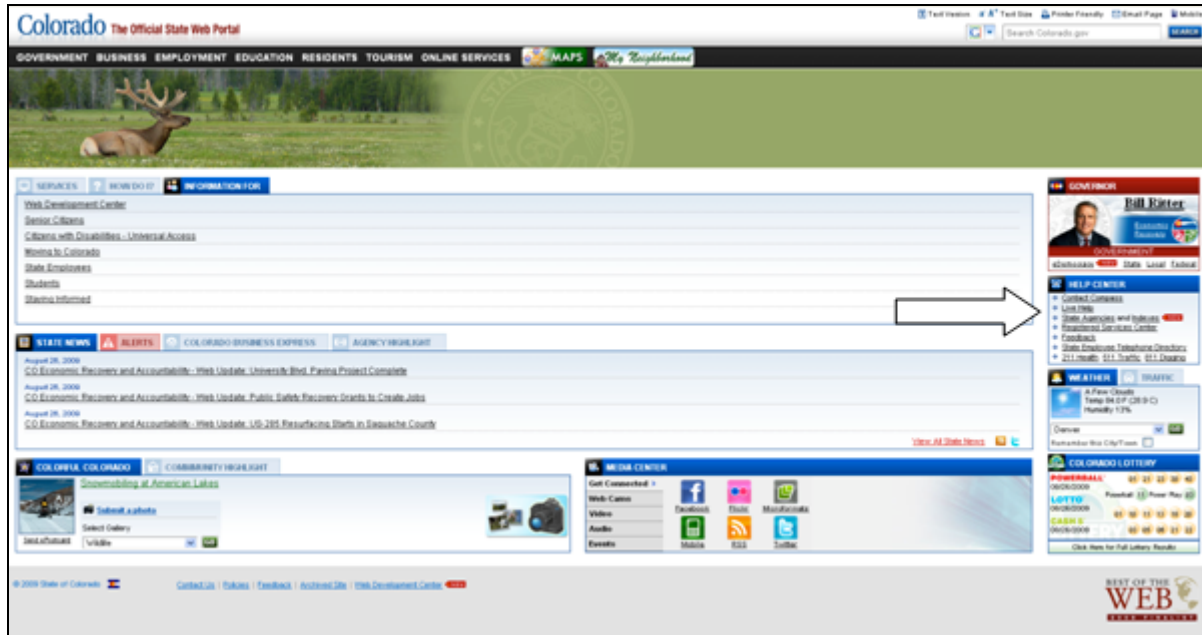
#### Mail

Colorado Interactive  
600 17<sup>th</sup> Street, Suite 2150 South  
Denver, CO 80202

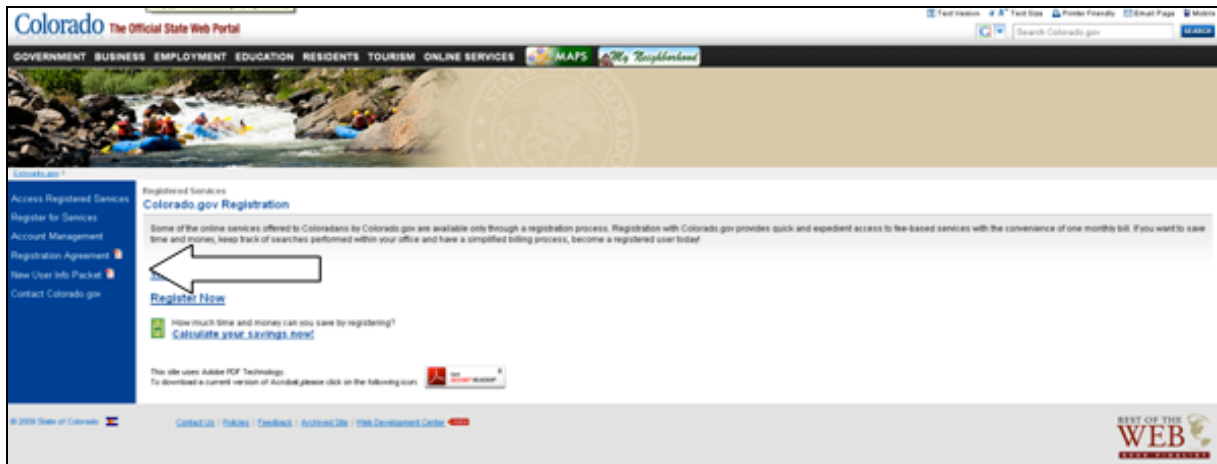
## 2 Adding a User

This function allows the Customer Administrator to add a new user at anytime. The Customer Admin will issue a username and password and then contact Colorado Interactive to activate that user.

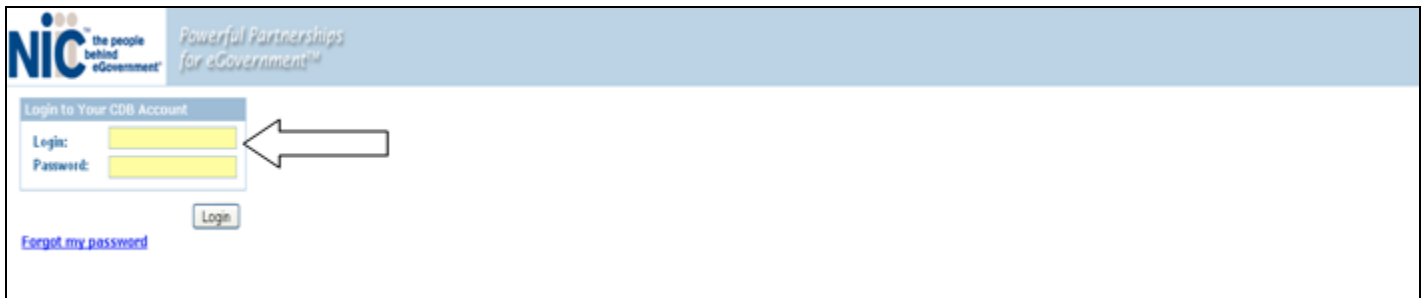
### 2.1.1 Colorado.gov Homepage-Access the Registered Services page



### 2.1.2 Registered Services Page-Access Account Management page



### 2.1.3 Log into CDB (Customer Data Base)-Enter username and password



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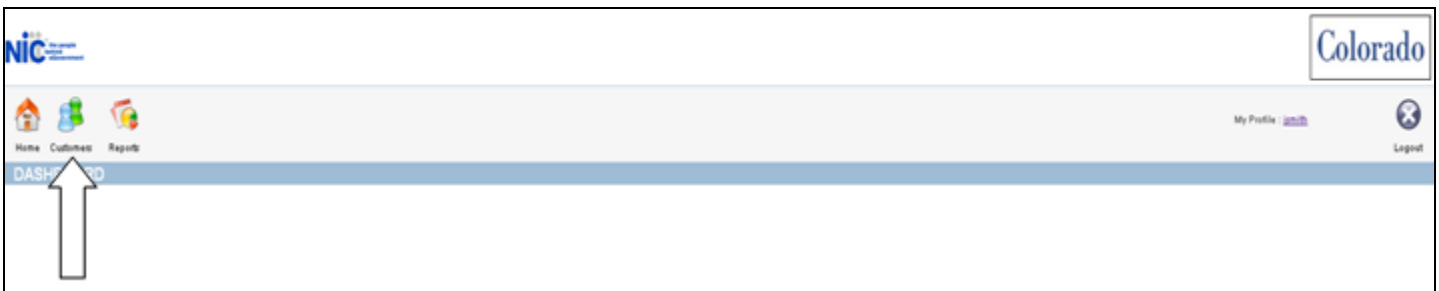
Login to Your CDB Account

Login:

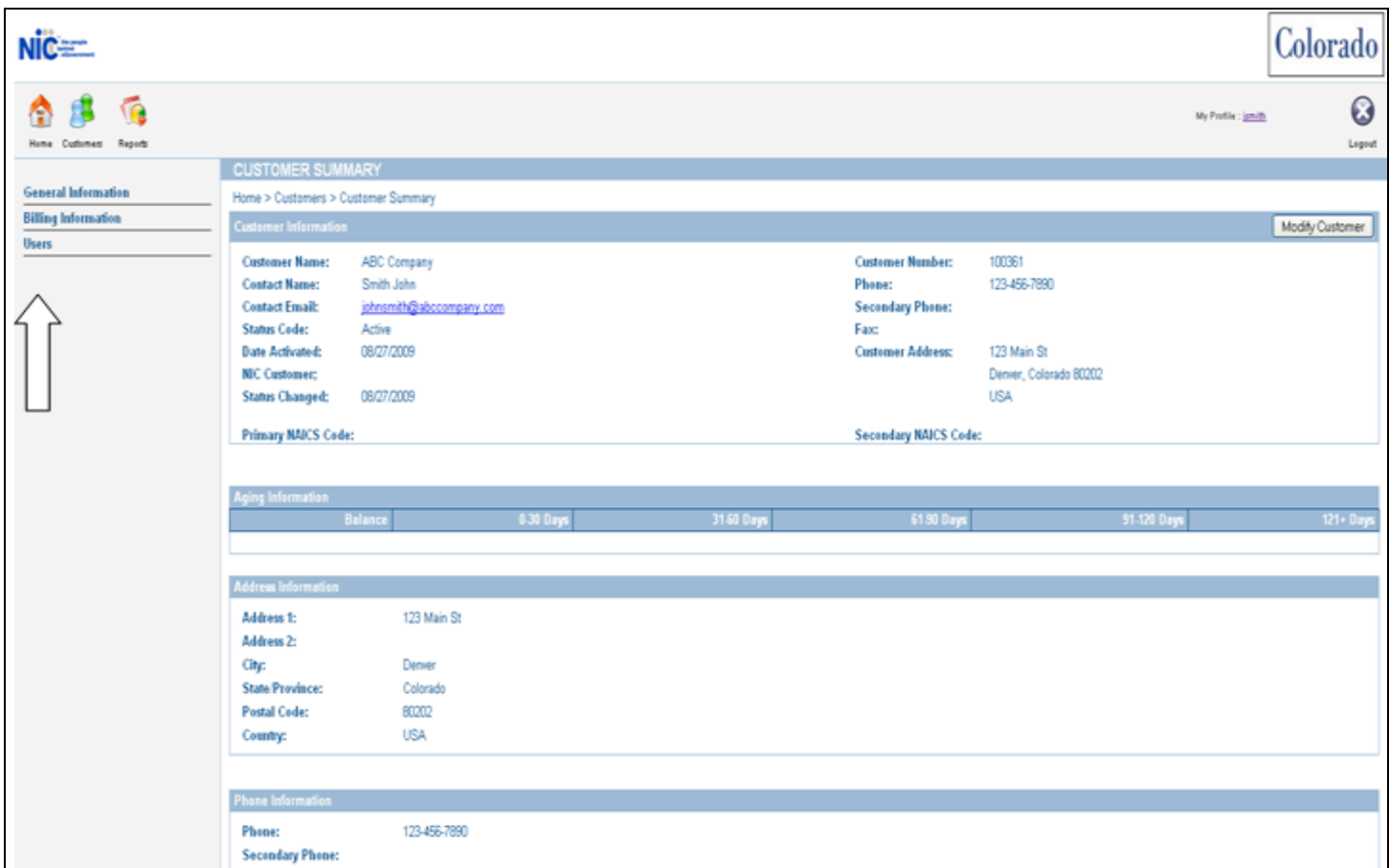
Password:

[Forgot my password](#)

### 2.1.4 Select Customer



### 2.1.5 Select Users



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Colorado

Home Customers Reports

General Information  
Billing Information  
Users

**CUSTOMER SUMMARY**

Home > Customers > Customer Summary

Customer Information

Customer Name: ABC Company  
Contact Name: Smith John  
Contact Email: [johsmith@abccompany.com](mailto:johsmith@abccompany.com)  
Status Code: Active  
Date Activated: 08/27/2009  
NIC Customer:  
Status Changed: 08/27/2009

Customer Number: 100361  
Phone: 123-456-7890  
Secondary Phone:  
Fax:  
Customer Address: 123 Main St  
Denver, Colorado 80002  
USA

Primary NAICS Code: Secondary NAICS Code:

**Aging Information**

Balance	0-30 Days	31-60 Days	61-90 Days	91-120 Days	121+ Days

**Address Information**

Address 1: 123 Main St  
Address 2:  
City: Denver  
State/Province: Colorado  
Postal Code: 80002  
Country: USA

**Phone Information**

Phone: 123-456-7890  
Secondary Phone:

## 2.1.6 Select Add User

Home > Customers > Customer Summary > Users

Customer Information

Customer Name: ABC Company Customer Number: 100361

Total records: 2 page 1 of 1

Login	Name	Login Type	Email	Phone	Status	
100361_billing_user		Default Billing User			Active	New Password
j.smith	John Smith	Customer Admin	johnsmith@abccompany.com		Active	New Password

First | Previous | Next | Last

## 2.1.7 User Details

Please fill in user information and choose Submit

Home > Customers > Customer Summary > Users > Add User

Customer Information

Customer Name: ABC Company Customer Number: 100361

Add User

ID:  (Login should be at least 4 alphanumeric characters.)

Login:  Password:  Generate

First Name:  (Password should be at least 5 alphanumeric characters. Current strength requires at least one letter be upper case and one lower case.)

Last Name:

Email:

Status:  Active

The following section is optional, but if data is entered into this section the fields with an \* are required.

Address Information

Address 1:

Address 2:

City:

State/Province:  Colorado

Postal Code:

Country:  USA

The following section is optional, but if data is entered into this section the fields with an \* are required.

Phone Information

Main:

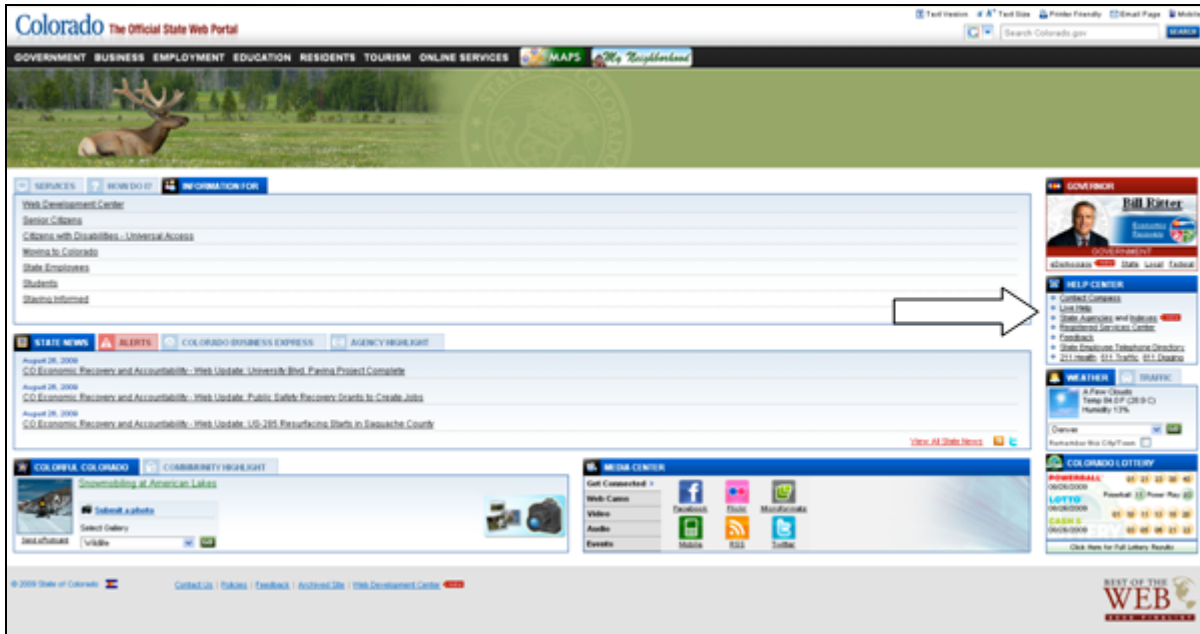
Secondary Phone:

Fax:

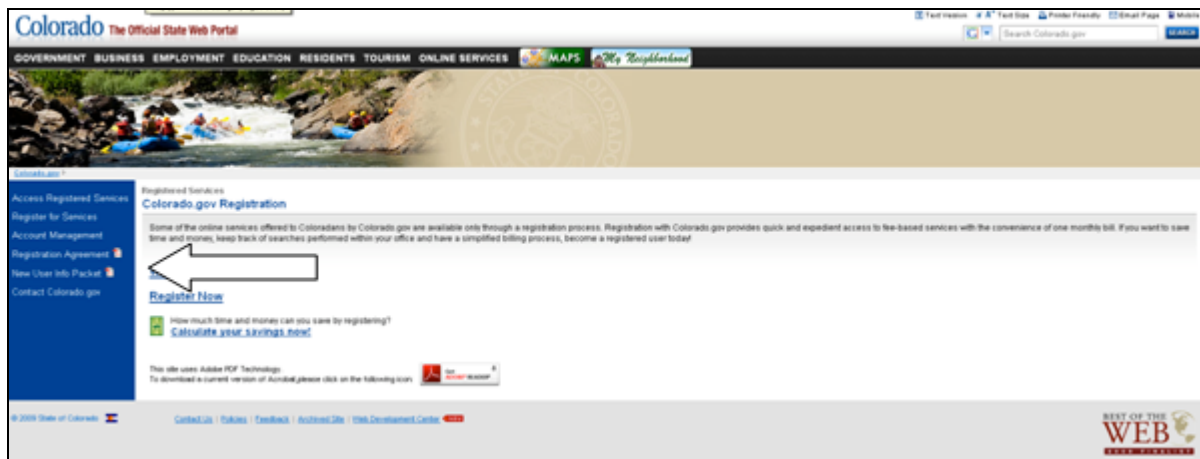
## 3 Deactivate User

This function allows the Customer Admin to deactivate any user at any time.

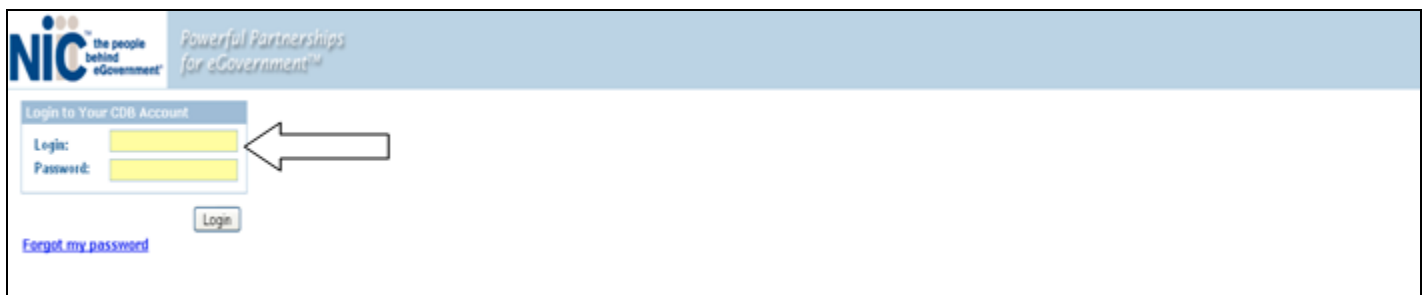
### 3.1.1 Colorado.gov Homepage-Access Registered Services page



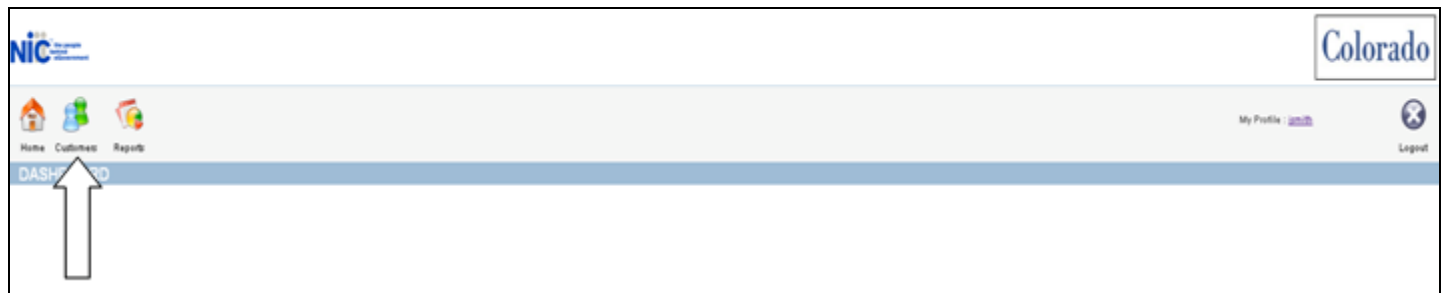
### 3.1.2 Registered Services Page-Access Account Management Page



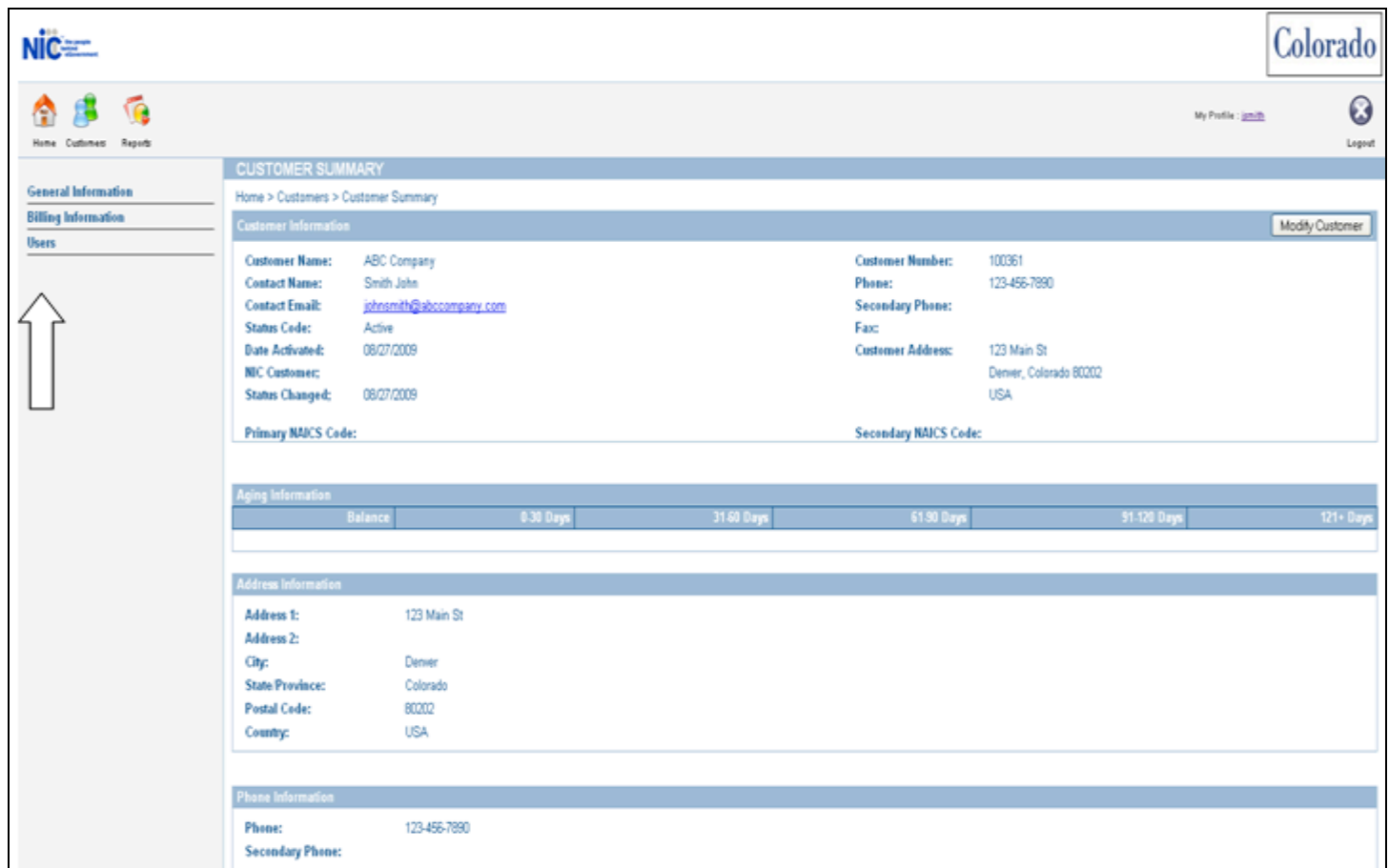
### 3.1.3 Log into CDB (Customer Data Base) –Enter your username and password



### 3.1.4 Select Customer



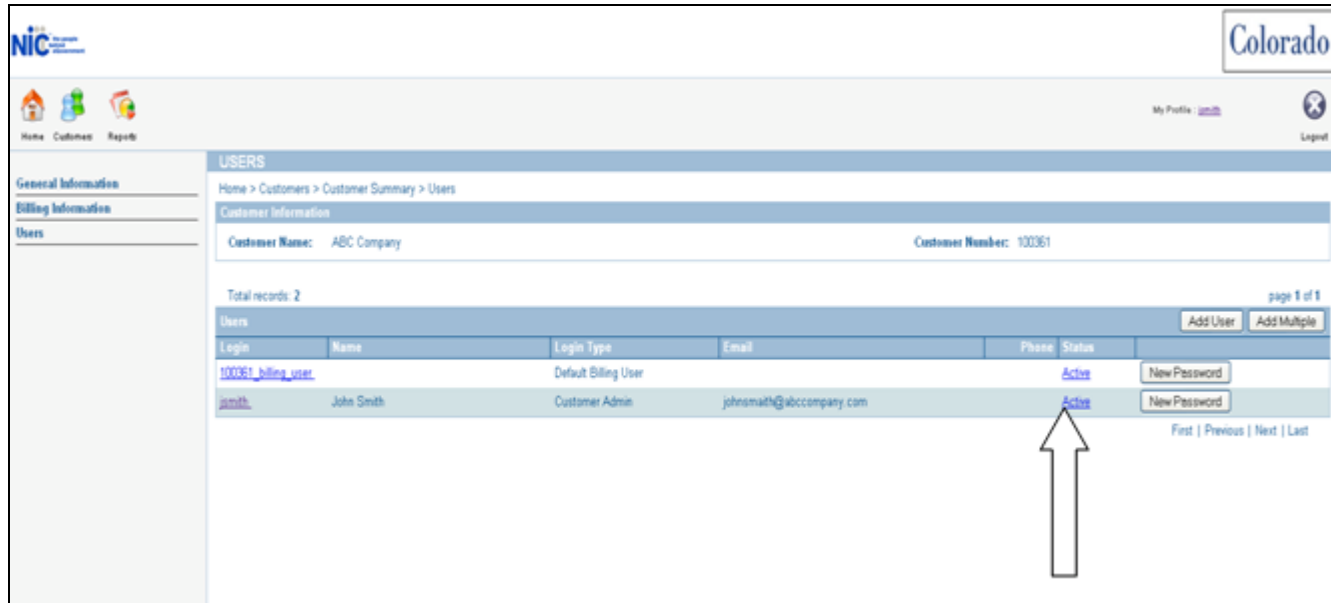
### 3.1.5 Select Users





### 3.1.6 User Deactivation

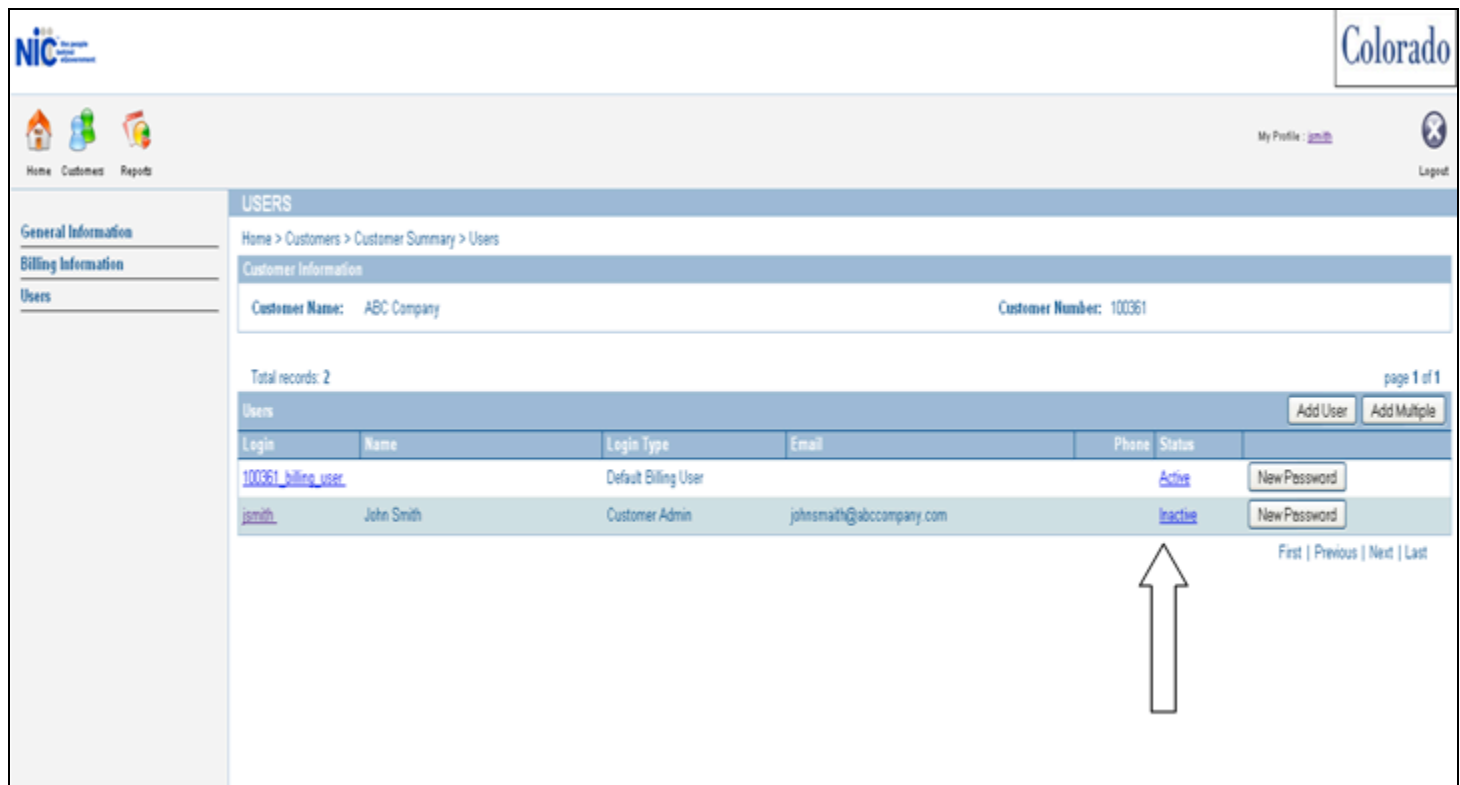
Find the user you wish to deactivate in user list and click on their 'Active' link as shown below.



The screenshot shows the 'USERS' management interface for 'ABC Company' (Customer Number: 100361). The page includes a sidebar with navigation links (Home, Customers, Reports) and a main content area. The user list table has columns for Login, Name, Login Type, Email, Phone, and Status. Two users are listed: '100361\_billing\_user' (Default Billing User) and 'j.smith' (John Smith, Customer Admin). The 'Status' column for 'j.smith' shows 'Active', which is highlighted by a large white arrow. There are 'Add User' and 'Add Multiple' buttons at the top right of the table, and 'New Password' buttons for each user.

Login	Name	Login Type	Email	Phone	Status
<a href="#">100361_billing_user</a>		Default Billing User			<a href="#">Active</a>
<a href="#">j.smith</a>	John Smith	Customer Admin	johnsmith@abccompany.com		<a href="#">Active</a>

The page will automatically refresh and display the user as 'Inactive'.



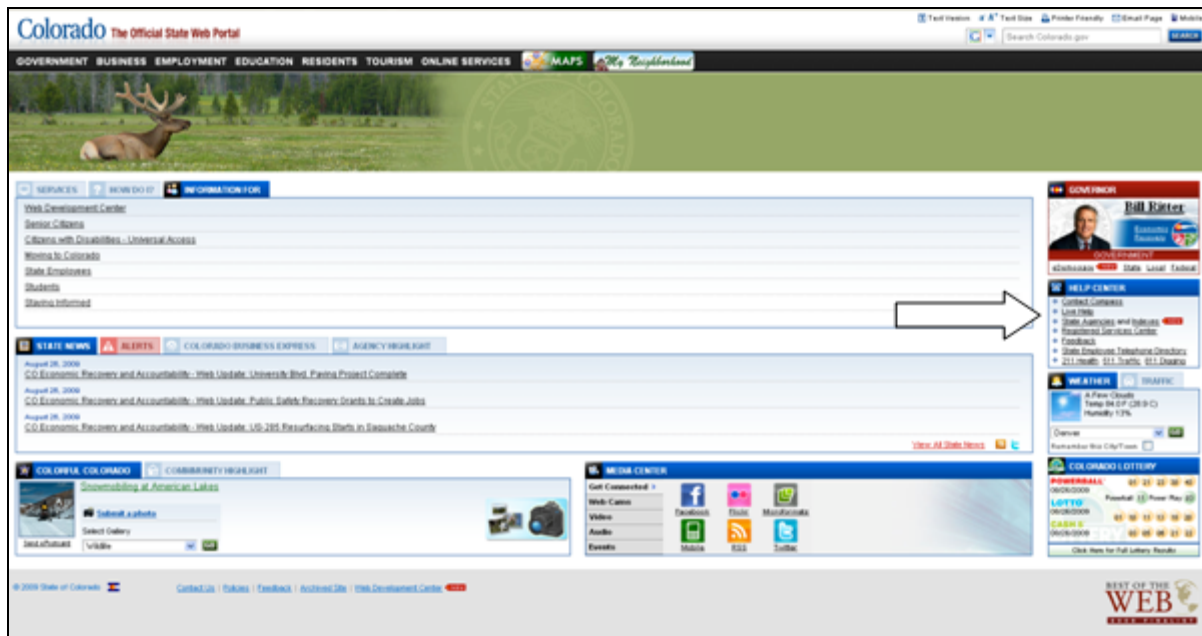
This screenshot shows the same 'USERS' management interface after the user 'j.smith' has been deactivated. The 'Status' for 'j.smith' is now 'Inactive', highlighted by a large white arrow. The '100361\_billing\_user' remains 'Active'. The page layout and navigation elements are consistent with the previous screenshot.

Login	Name	Login Type	Email	Phone	Status
<a href="#">100361_billing_user</a>		Default Billing User			<a href="#">Active</a>
<a href="#">j.smith</a>	John Smith	Customer Admin	johnsmith@abccompany.com		<a href="#">Inactive</a>

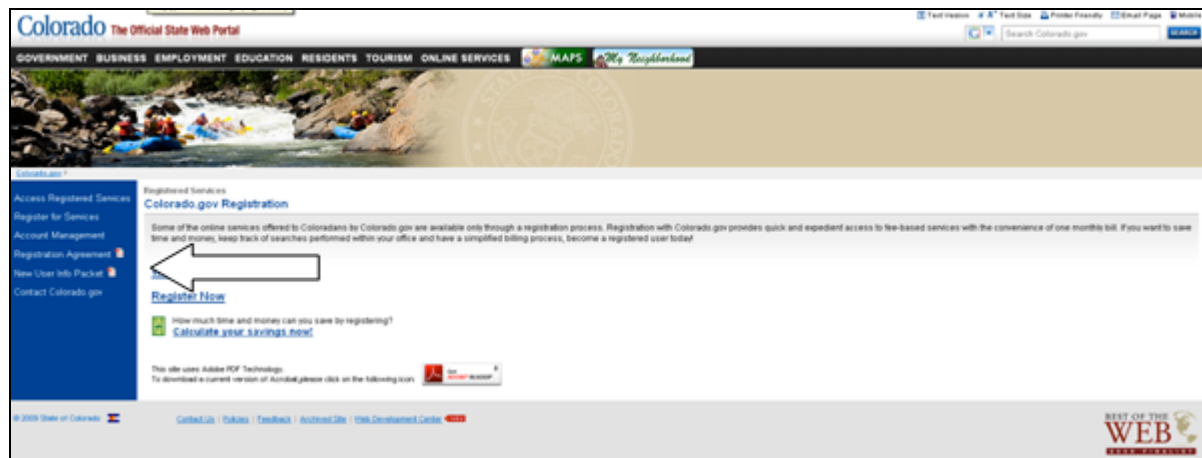
## 4 Change Password

This function allows the Customer Admin to change any user's password at anytime.

### 4.1.1 Colorado.gov Homepage-Access Registered Services page



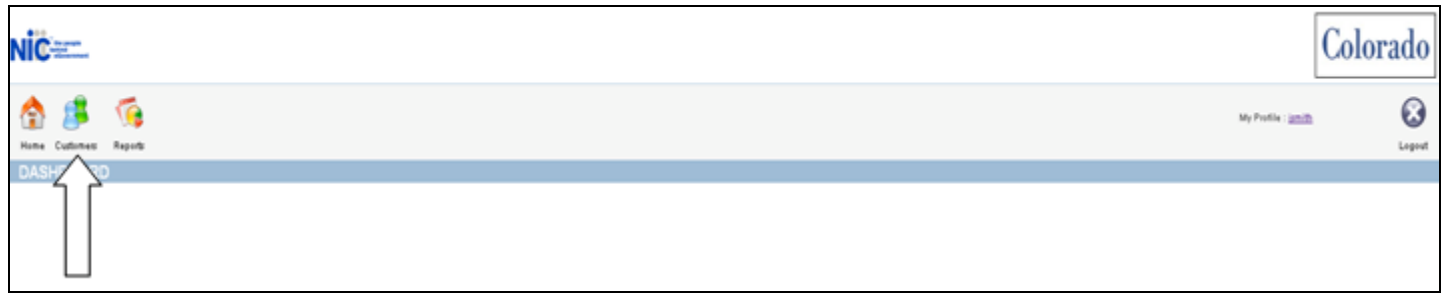
### 4.1.2 Registered Services Page-Access Account Management Page



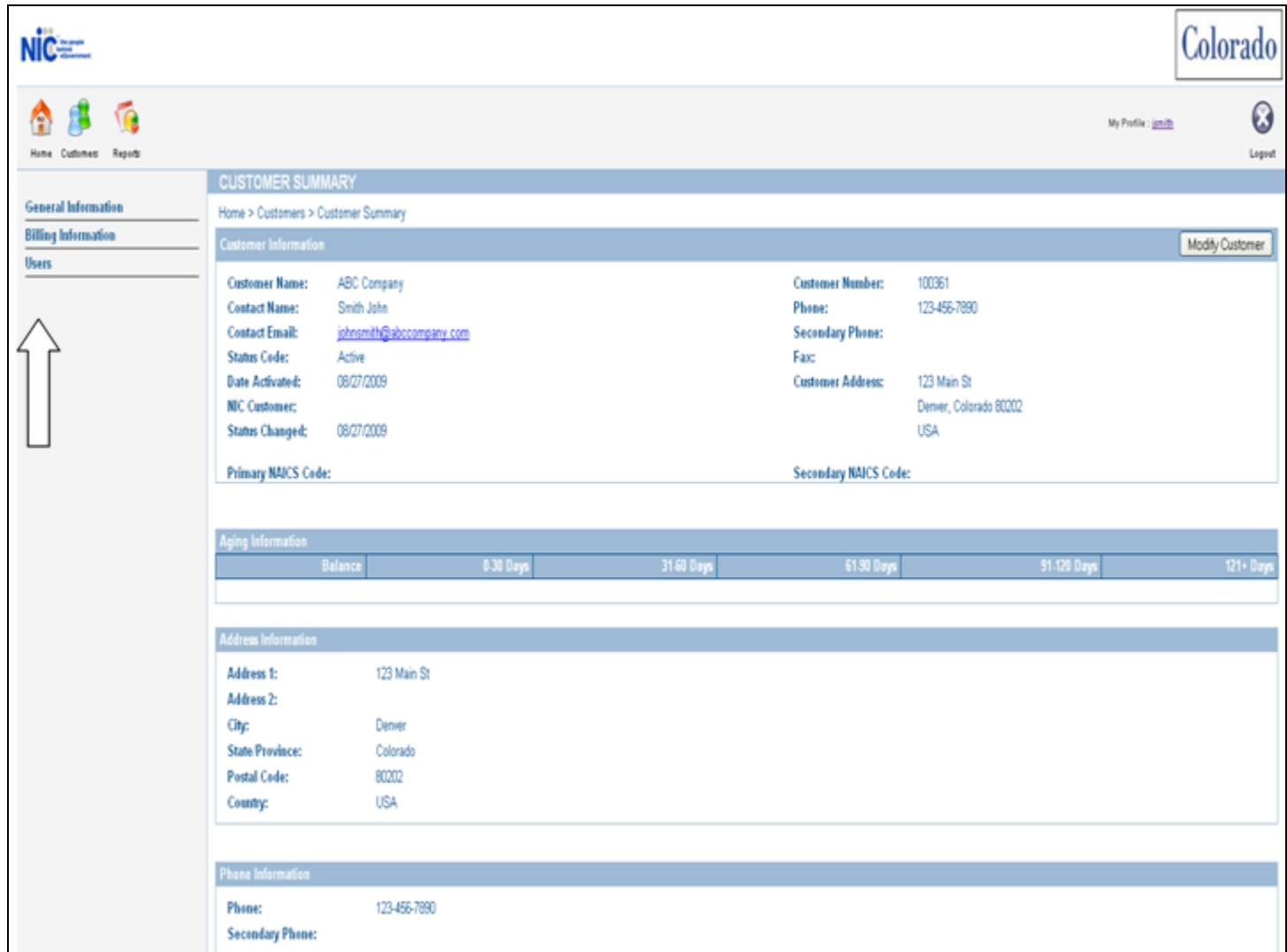
### 4.1.3 Log into CDB (Customer Data Base) –Enter your username and password

The screenshot shows the NIC Login to Your CDB Account form. It includes fields for 'Login:' and 'Password:', a 'Login' button, and a 'Forgot my password' link. The NIC logo is at the top left, and the text 'the people behind eGovernment' and 'Powerful Part for eGovernment' are at the top right.

#### 4.1.4 Select Customer



#### 4.1.5 Select Users



#### 4.1.6 Changing Users Password

Locate the user from the list that you wish to reset the password for and click their 'New Password' link

The screenshot displays the 'USERS' management page for Customer 100361. The page includes a sidebar with navigation links (Home, Customers, Reports) and a main content area. The main area shows a table of users with columns: Login, Name, Login Type, Email, Phone, Status, and Action. The user 'jsmith' is listed with status 'Inactive'. A 'New Password' link is present in the Action column for this user. A large white arrow points to this link.

Login	Name	Login Type	Email	Phone	Status	Action
100361_billing_user		Default Billing User			Active	New Password
jsmith	John Smith	Customer Admin	johnsmith@abccompany.com		Inactive	New Password

#### 4.1.7 Reset Password Confirmation

A window will open with a new password, note the password and close the window. Be advised that once you close that window you will no longer be able to see the password and will have to reset it again.

The screenshot shows the same 'USERS' management page as before, but with a 'New Login Password' modal window open. The modal contains the following information:

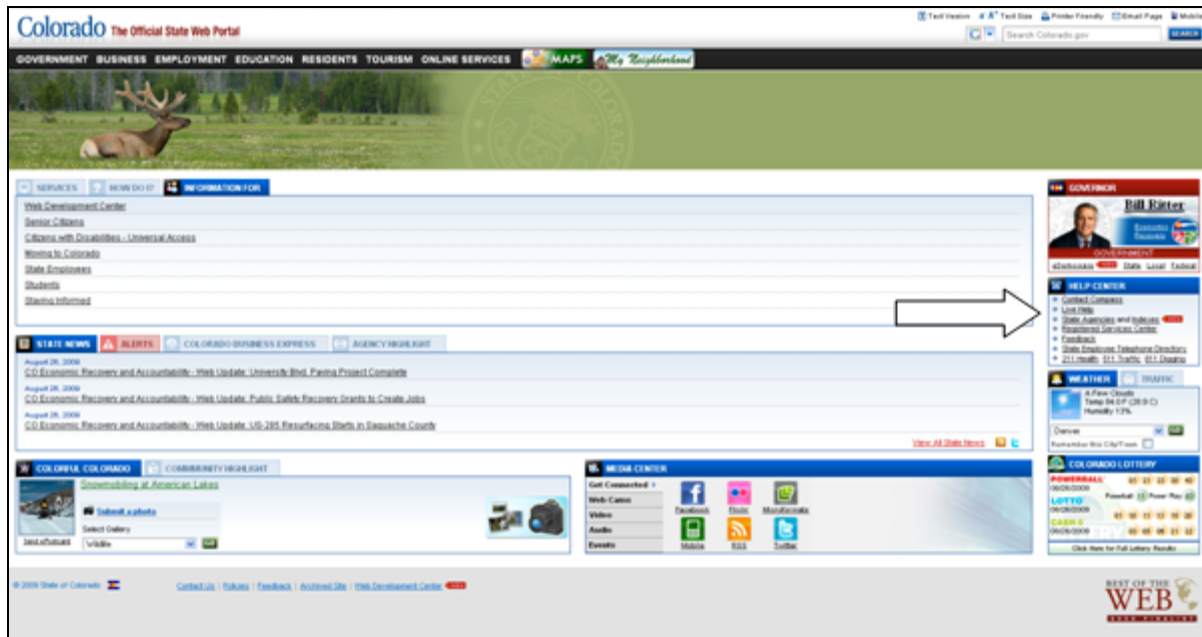
- Login Name: jsmith
- Password: ddrOToc
- A 'close' button.

A large white arrow points to the modal window.

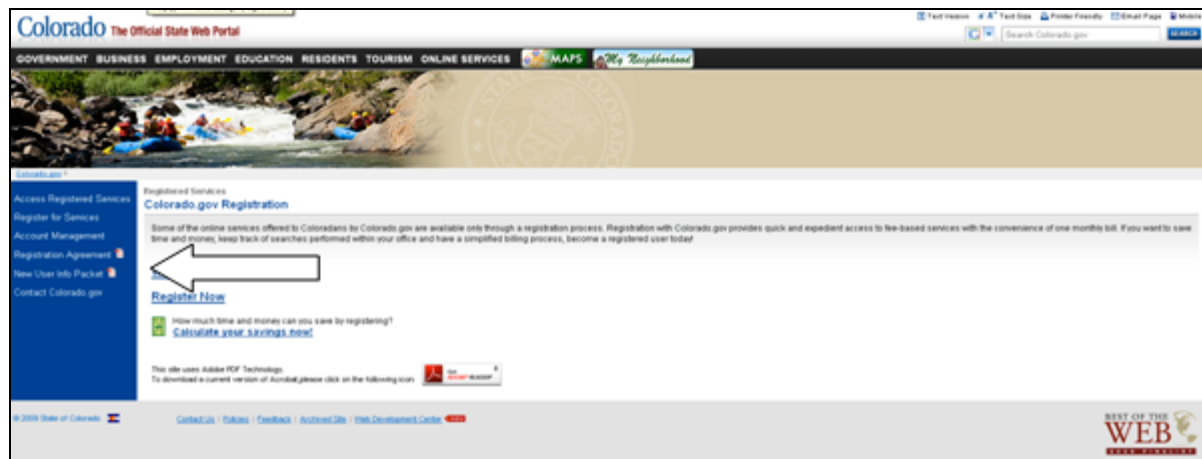
## 5 Change General Information

This function allows the Customer Admin to change the general information for the company such as contact information.

### 5.1.1 Colorado.gov Homepage-Access Registered Services page



### 5.1.2 Registered Services Page-Access Account Management Page



**5.1.3 Log into CDB (Customer Data Base) –Enter your username and password**

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Login to Your CDB Account

Login:

Password:

[Forgot my password](#)

**5.1.4 Select Customer**

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Home Customers Reports

DASHBOARD

**5.1.5 Choose Modify Customer**

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Colorado

Home Customers Reports

My Profile: [smith](#)

**CUSTOMER SUMMARY**

Home > Customers > Customer Summary

**Customer Information**

Customer Name: ABC Company Customer Number: 100361  
 Contact Name: Smith John Phone: 123-456-7890  
 Contact Email: [johnsmith@abccompany.com](mailto:johnsmith@abccompany.com) Secondary Phone:  
 Status Code: Active Fax:  
 Date Activated: 06/07/2009 Customer Address: 123 Main St  
 NIC Customer: Denver, Colorado 80202  
 Status Changed: 06/07/2009 USA  
 Primary NAICS Code: Secondary NAICS Code:

**Aging Information**

Balance	0-30 Days	31-60 Days	61-90 Days	91-120 Days	121+ Days

**Address Information**

Address 1: 123 Main St  
 Address 2:  
 City: Denver  
 State/Province: Colorado  
 Postal Code: 80202  
 Country: USA

**Phone Information**

Phone: 123-456-7890  
 Secondary Phone:  
 Fax:

The screen changes (as shown below) to allow user to make any desired changes. Once all changes have been made please select the 'Submit' button at the bottom.

The screenshot displays the 'MODIFY CUSTOMER' interface. At the top, there is a navigation bar with the NIC logo on the left and the Colorado logo on the right. Below the navigation bar, a sidebar on the left contains a 'Modify Customer' link. The main content area is titled 'MODIFY CUSTOMER' and includes a breadcrumb trail: 'Home > Customers > Customer Summary > Modify Customer'. The form is divided into three main sections: 'Customer Information', 'Address Information', and 'Phone Information'. Each section contains various input fields for customer details, some of which are marked as required with an asterisk. The 'Customer Information' section includes fields for Organization Name, Organization ID, Create Date, NIC Customer, Status Code, First Name, Last Name, Email, Primary NAICS Code, and Secondary NAICS Code. The 'Address Information' section includes fields for Address 1, Address 2, City, State/Province, Postal Code, and Country. The 'Phone Information' section includes fields for Main, Secondary Phone, Fax, and Mobile. There are also buttons for 'Click to Modify NAICS Code' next to the Primary and Secondary NAICS Code fields.

**MODIFY CUSTOMER**

Home > Customers > Customer Summary > Modify Customer

**Customer Information**

Organization Name: ABC Company

Organization ID: 100361

Create Date: 08/27/2009

NIC Customer:

Status Code: Active

First Name: John

Last Name: Smith

Email: johnsmith@ebccompany.com

Primary NAICS Code: Click to Modify NAICS Code

Secondary NAICS Code: Click to Modify NAICS Code

The following section is optional, but if data is entered into this section the fields with an \* are required.

**Address Information**

Address 1: 123 Main St

Address 2:

City: Denver

State/Province: Colorado

Postal Code: 80202

Country: USA

The following section is optional, but if data is entered into this section the fields with an \* are required.

**Phone Information**

Main: 123-456-7890

Secondary Phone:

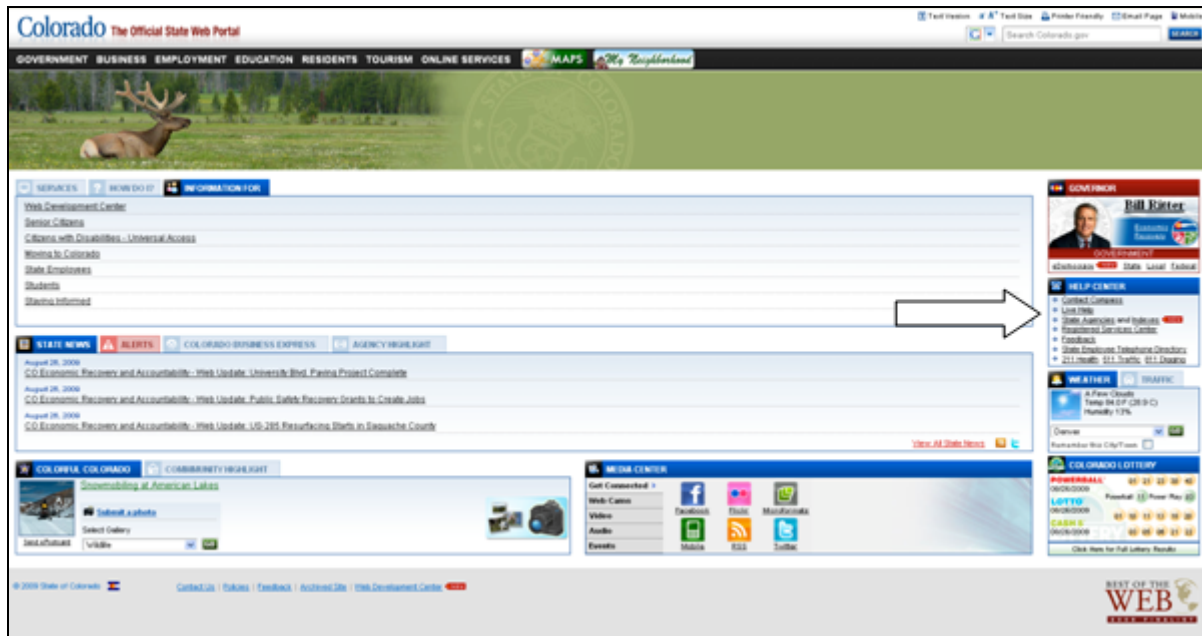
Fax:

Mobile:

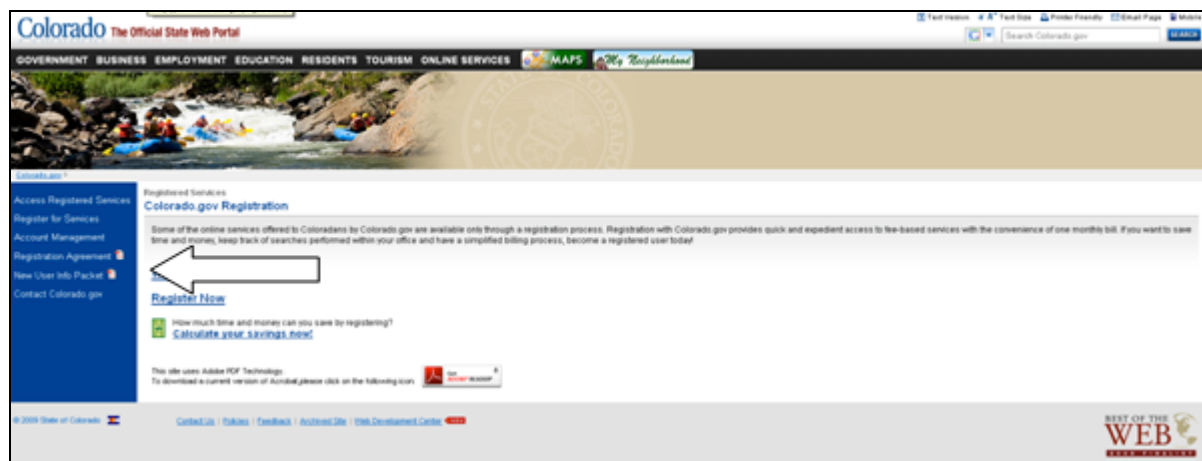
## 6 Change Billing Information

This function allows the Customer Admin to change the billing information for the account.

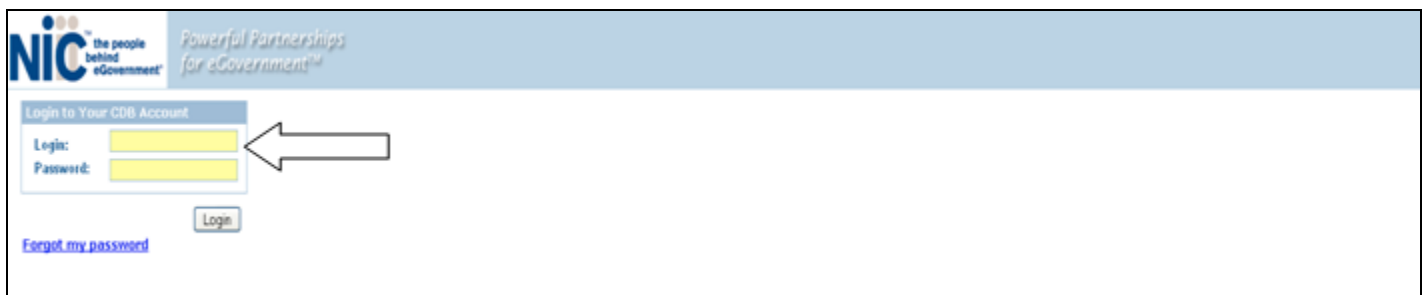
### 6.1.1 Colorado.gov Homepage-Access Registered Services page



### 6.1.2 Registered Services Page-Access Account Management Page

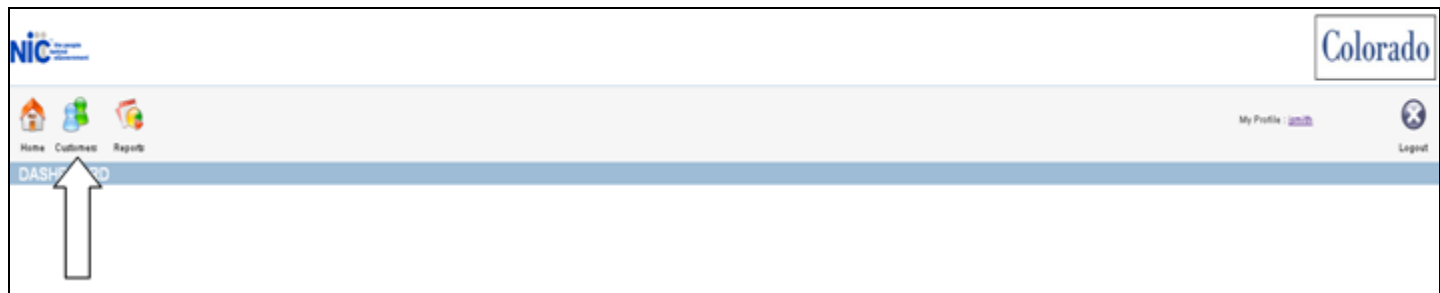


### 6.1.3 Log into CDB (Customer Data Base) –Enter your username and password

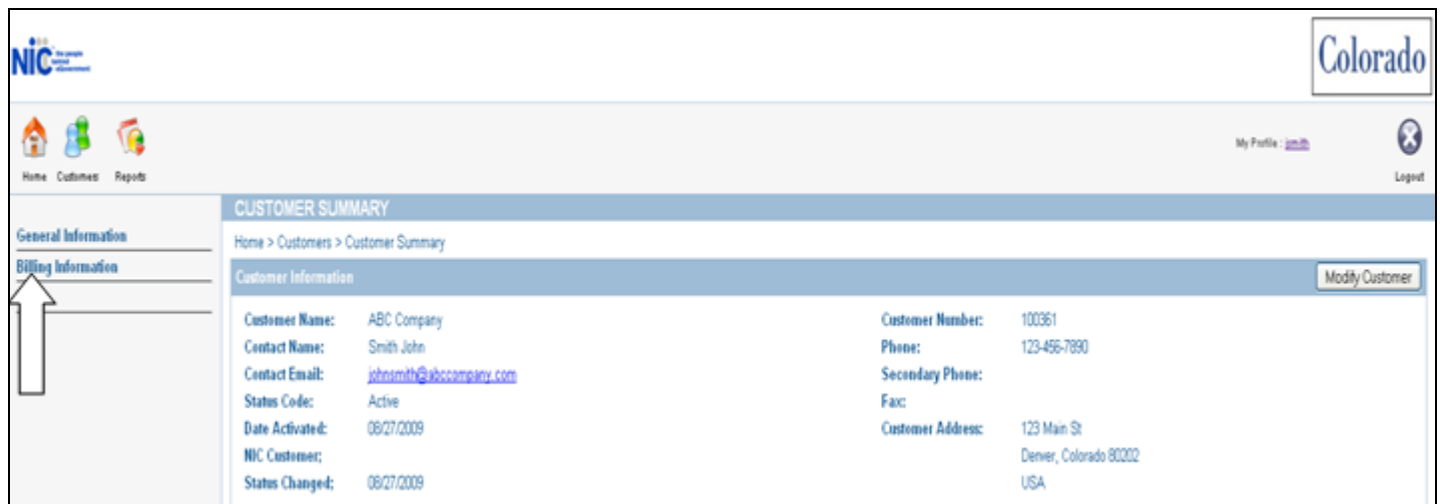




### 6.1.4 Select Customer



### 6.1.5 Select Billing Information



### 6.1.6 Select Modify Billing



Choose desired billing option and fill in the required information, once complete select the 'Submit' button.

<b>General Information</b> <b>Billing Information</b> <b>Users</b>	<b>MODIFY BILLING INFORMATION</b>	
	Home > Customers > Customer Summary > Billing Information > Modify Billing Information	
	<b>Customer Information</b>	
	Customer Name: ABC Company	Customer Number: 100361
	<b>Credit Card Option</b>	
	Credit Card: <input type="text"/>	
	Card Expiration Date: <input type="text"/> (mm/yyyy)	
	Card Type: -- Card type --	
	<b>ACH Option</b>	
	Routing Number: <input type="text"/>	
	Account Number: <input type="text"/>	
	Account Type: -- Account Type --	
	Customer Type: -- Customer Type --	
	Bank Name: <input type="text"/>	
	<b>Online Invoice Option</b>	
	Email: <input type="text"/>	
	<b>Mailed Invoice Option</b>	
	Organization Name: ABC Company <input checked="" type="checkbox"/> Same as Main	
	First Name: John <input type="text"/>	
	Last Name: Smith <input type="text"/>	
	Address 1: 123 Main St <input type="text"/>	
	Address 2: <input type="text"/>	
	City: Denver <input type="text"/>	
	State/Province: Colorado <input type="text"/>	
	Postal Code: 80202 <input type="text"/>	
	Country: USA <input type="text"/>	
	<input type="button" value="Cancel"/> <input type="button" value="Submit"/>	

## 7 Security Best Practices

### 7.1 SYSTEM MAINTENANCE

Maintain your systems with the most current security patches (aka Service Packs) from your system's vendor. This will close most of the known security holes. Limit the amount of services and applications you are running simultaneously. The more services running, the greater the risk of exposing the system to exploitation. Finally, remove any programs or applications not being used and defragment your hard drive on a regular basis to help your system's overall performance.

### 7.2 PASSWORD SECURITY

Never store password as plain text or write down on paper. Use encryption utilities if you have to store the password in a file for some reason. Do not share your password with your coworkers.